

Getting Started in PRIMA

Contents

Introduction	1
Accessing PRIMA	1
Peer Review Knowledge Base	1
Creating an AICPA.org/CPA.com account.....	2
Resetting Your AICPA.org/CPA.com Password.....	2
Updating Your Account Profile.....	2
Associating Yourself with a Public Accounting Firm.....	2
Updating Your Position	3
Business Category.....	3
Creating a Public Accounting Firm.....	3
Enrolling Your Firm in Peer Review	4
Browser Compatibility.....	4
Who do I contact for help?.....	4
PRIMA Frequently Asked Questions	4

Introduction

The Peer Review Integrated Management Application (PRIMA) is the primary tool used by firms, reviewers, and the entities administering peer review to complete the peer review process. PRIMA is accessible to all AICPA and CPA.com customers whose records are linked to a public accounting firm in our records. Please add prima@aicpa.org to your contact list or safe sender list to ensure you receive peer review related communications.

Accessing PRIMA

1. If you don't have an AICPA.org/CPA.com account, [register a user account](#).
2. Go to prima.aicpa.org. If you are not logged into AICPA.org or CPA.com, you will be prompted to log in with your AICPA.org/CPA.com credentials.

Peer Review Knowledge Base

The AICPA Peer Review Program has developed a knowledge base for peer review users. It includes step-by-step instructions for using PRIMA as well as additional information related to peer review matters.

To access the Knowledge Base:

1. Sign in to PRIMA at prima.aicpa.org.
2. Click on **Help** in the upper right-hand corner.

Creating an AICPA.org/CPA.com account

To register, please complete the following steps:

1. Click Sign In on www.aicpa.org or www.aicpastore.com.
2. Select the Register link on www.aicpa.org or the Register Now link for www.aicpastore.com and enter your email address.

If you do not already have an online account, you will choose Register using your AICPA member number if you are an AICPA Member, or customer number if you are a previous customer to setup a new account if you are not a member. If you already have an online account registered with that email address, you will have an opportunity to request a password reset to have a temporary password emailed to that address.

Resetting Your AICPA.org/CPA.com Password

To retrieve your password on the AICPA website:

1. Click Forgot Password on the sign-in screen.
2. Enter the email address associated with your AICPA account.
3. Click the Submit button.

Your reset password will be emailed to you.

To change your password on the AICPA website, please Sign In to your account following the steps below:

1. Click on My Account at the top of the page.
2. Click on Change Password under Settings.

If you need additional assistance, please contact Member Service at service@aicpa.org or 888.777.7077, M–F 9am–6 pm ET.

Updating Your Account Profile

Associating Yourself with a Public Accounting Firm

You will not be able to access PRIMA if you are not associated with a public accounting firm in our records.

To add a relationship to a public accounting firm online:

1. [Sign in](#) to AICPA.org.
2. Click on **My Account**.
3. Click on **Employer Information**.
4. Click on **Add Employer**.
5. Enter your employer name. (You may also enter city, state, and postal code information to narrow your search).
6. Click on **Search**.

If an organization matches your search:

1. Select the radio button next to the best match.
2. Click on **Choose this organization**.

3. Select your position from the drop-down.
4. Select Public Accounting from the drop-down.
5. Select your email address from the drop-down or click on **Add** to the right of the Email drop-down.
6. If you are adding an email address, enter the address and click on **Save**.
7. Select your phone number from the drop-down or click on **Add** to the right of the Phone drop-down.
8. If you are adding a phone number, enter the phone number and click on **Save**.
9. Click on **Add Position**.

If no organization matches your search, do not click on None of These Match My Organization. You will not be able to create a new public accounting firm online. Please see [Creating a Public Accounting Firm](#).

Updating Your Position

You will not be able to enroll your firm in peer review if there is not at least one customer record associated with your firm that is identified as a partner/owner of your firm.

To update your position online:

1. [Sign in](#) to AICPA.org.
2. Click on **My Account**.
3. Click on **Employer Information**.
4. Click on **Edit**.
5. Select the appropriate position from the drop-down.
6. Click on **Save**.

Business Category

You will not be able to access PRIMA or enroll your firm in peer review if it is not correctly identified as a public accounting firm in our records. If your existing firm record has an incorrect business category (e.g., business and industry, consulting firm, etc.), please call 888.777.7077 to speak to a member of our Member Services team to request your firm record be updated to public accounting.

To view the business category of your organization:

1. [Sign in](#) to AICPA.org.
2. Click on **My Account**.
3. Click on **Employer Information**.
4. Click on **Edit**.

The business category of your organization is below the field indicating your Position at that organization.

Creating a Public Accounting Firm

Users are not permitted to create public accounting firms on AICPA.org or to change the business category of their organization to public accounting.

If you need to create a new public accounting firm:

1. Complete the Public Accounting Firm Creation Form.
2. If this new firm is the result of a firm merger, purchase, sale or dissolution, please complete the [Firm Structure Change Form](#).
3. Submit the Public Accounting Firm Creation Form and Firm Structure Change Form (if applicable) to your [Administering Entity](#).

Enrolling Your Firm in Peer Review

Enrollment is available online for firms to enroll in the AICPA Peer Review Program as well as other state society sponsored programs, if one is available in your state. Firms with AICPA members cannot enroll in a state society sponsored program, as enrollment in the AICPA Peer Review Program is a requirement for membership. For firms enrolling in the AICPA Peer Review Program, unless your firm elects to or is required by Standards to be administered by the National Peer Review Committee, your review will be administered by the state society or entity that administers the AICPA Peer Review Program in your jurisdiction.

Any partner-level user associated with your firm can complete the peer review enrollment form online. The firm managing partner will need to approve any enrollment submission before it will be transmitted to your Administering Entity for approval.

To complete firm enrollment, perform the following steps:

1. Log into prima.aicpa.org
2. Click **Manage My Firm(s)**.
3. Click **Enroll/Update**.
4. Click **New Enrollment**.
5. Review Introduction and click Next.
6. Enter EIN and firm details.
7. Click **Next**.
8. Enter Industries and Practices information.
9. Click **Next**.
10. Review Summary and click **Next**.
11. Select Acknowledgements and click **Submit**.

Browser Compatibility

PRIMA supports Apple's [Safari](#), Google's [Chrome](#), Microsoft's [Internet Explorer](#) 11+, and Mozilla's [Firefox](#) web browsers.

Who do I contact for help?

PRIMA support is provided by the AICPA Peer Review Program. Contact us at 919.402.4502 or email prsupport@aicpa.org. For assistance with your AICPA.org/CPA.com account, please contact AICPA Member Service at service@aicpa.org or 888.777.7077. Staff are available to assist 8 AM to 6 PM ET.

PRIMA Frequently Asked Questions

[PRIMA FAQs for Enrolled Firms and Peer Reviews](#)